GSA

Federal Acquisition Service

Client Order Information (COI)

GSA User Training developed for NITCP

COI Training Module Overview

Objective: This training module will take you step-by-step through the Client Order Information (COI) document in the Regional Business Application (RBA) IT-Solutions Shop (ITSS) component.

COI Glossary

Term	Definition
CO	Contracting Officer
COM	Commodity fiscal task type
Commodities	An order for hardware, software, may also include installation.
COST	Cost fiscal task type
CSR	Customer Service Representative
FFP	Firm Fixed Price fiscal task type. A task in which one price covers all costs.
FM	Fund Manager
IA	Interagency Agreement
NITCP	National IT Commodity Program
LAB	Labor fiscal task type.
PCOC	Preparing Contract Office Code. The system collects the required PCOC value so that PIID Code can be generated. PCOC value depends on the user's default 'Region' or 'Program'. For Region 31, the PCOC value is BU000.
Peer Access List	Includes members of the same registered organization as the primary client, with limited access to the order.
PIID	Procurement Instrument Identifier. See the *Standardized Numbering Conventions* training module for more information.

COI Privileges

User Role | Action	Create	Edit	View
GSA User	✓	✓	✓
Client			✓
Contractor			✓*

*Contractors may view if they are on the BOMSOW Contractor List

Click on the COI link in the Order Package View to open an existing COI in view mode. Only one COI document exists per order.

IT-Solutions Shop
GSA You are signed in as Christopher CSR

IT-Solution   Contact Us • Need Assistance • Log Out

| WELCOME | ORDERS | FUNDING | REGISTRATION | CONTRACTS |

Select a View:

| <<-- View Orders -->> ▼ | <<-- View Inactive Orders -->> ▼ | <<-- View Action Items -->> ▼ | <<-- View Support Information -->> ▼ |

Go to a Specific View Item: [_____] [Go]   Create New Order

Orders - Entire Package

Next -> |

▼ Order Package

  ▼ID40120045-COI Sarah Client (Organization Name) GSA Evaluating>>IT Commodities procurement

    00 Chronology

   ▶ 01 Electronic Contract File (ECF)

    01 BOM/SOW ID40120045 - 000 Version 00 Amendment 00 IN-PROCESS

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5

Within the Pre-Award Workflow Context
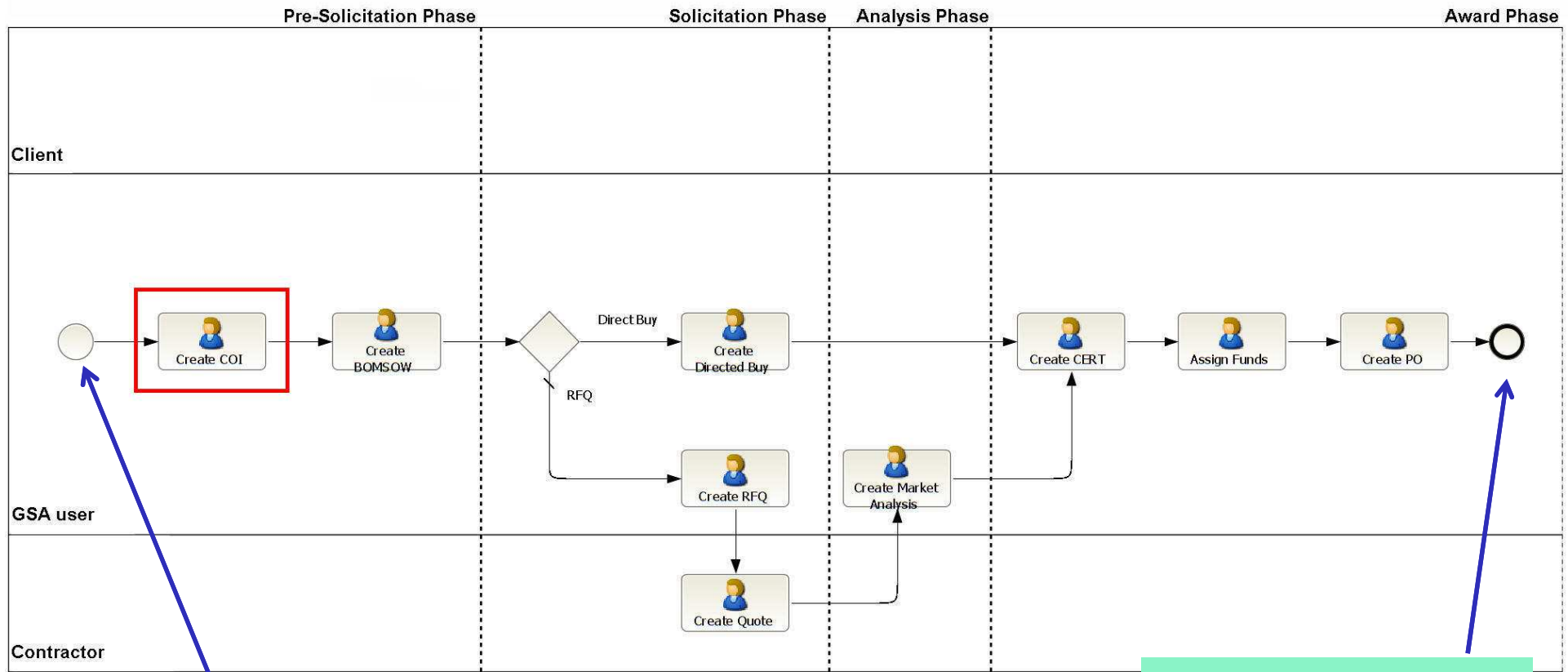
Begin: Client contacts AAS (outside of RBA) seeking assistance

End: Purchase Order is signed by Contracting Officer and awarded. Next phase is Post-Award.

GSA user may generate a COI by first clicking on the *Create New Order* link either on the ITSS Welcome page or the ITSS Orders Tab. A new page will load prompting GSA user to select a client.

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WELCOME | ORDERS | FUNDING | REGISTRATION | CONTRACTS

Select A Client From The List Below

Go to a Specific Client: [_____] [Go]

Enter part of a name and click *Go* to jump to matching client names

Next ->

Aaron Client (Department of Agriculture)
Ada Client (HQ NAIC)
Adrianne Client (90 Communications Squadron)
Albert Client (81st Medical Group)
Allen Client (Department of Veterans Affairs)
Allison Client (Center for Information Technology)
Amber Client (Headquarters Air Combat Command(ACC/XP))
Andrew Client (USAF EC/EOS)
Angeline Client (USAID)
Antoine Client (Battle Command Battle Lab)

The client list is sorted alphabetically by first name

[Select]

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The client list displays 30 names at a time. Use the Next / Previous arrows to see more clients

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WELCOME   ORDERS   FUNDING   REGISTRATION   CONTRACTS

Client Order Information

[Close Without Saving]

The status of the entire order

☞ All Fields marked with 🟡 are required.

Client Rep: Sarah Client (Organization Name)
Submitted By: Christopher CSR at 02/22/2012
Order Status: Draft

Enter a description to identify the entire order

▼ **Preliminary Requirements Description**

Enter a one-line description of this order for identification in views

Project Descriptor: 🟡 IT Commodities procurement
Estimated $ Value:
Funding Type: 🟡 REGULAR ▼

Enter the total estimated dollar value of the order. Used for reporting purposes.

GSA Cust Service Representative: Christopher CSR

Only orders with regular funding can have *fee-only* task items

Client's Address Information
Client Addressing Information:
Client Agency: 🟡 17 DEPARTMENT OF THE NAVY
Client Organization: 🟡 Organization Name
Client Phone: 🟡 (619) 555-0105   Ext:
Client Fax: 🟡 (619) 555-0106
Address, Line 1: 🟡 123 Main St.
Address, Line 2:
City: 🟡 Springfield
State/Province: 🟡 CA ▼
Click here for state abbreviation descriptions
Zip/Postal Code: 🟡 95370
Country: 🟡 United States ▼

The Client's Address Information defaults to the client address on the client's user profile

9

Accepting Person's Address & Contact Information
Accepting Person's Address and Contact Information:

Accepting Person: Sarah Client

E-mail Address: sarah.client@nowhere.techflow.com

Direct Phone #: (619) 555-0105   Ext:

Fax #: (619) 555-0106

Address, Line 1: 123 Main St.

Address, Line 2:

City: Springfield

State/Province: CA
Click here for state abbreviation descriptions

Zip/Postal Code: 95370

Country: United States

The Accepting Person's Address & Contact Info defaults to the client info on the client's user profile

If the order has multiple shipping addresses select Yes. Users can add the additional addresses on the BOMSOW.

▼ Shipping Address or Place of Performance
If multiple ship-to addresses are required for this order, please select the option below. All references to ~~Materials or Statement of Work.~~

Are there Multiple Ship-To Addresses on this order? ○ Yes ⦿ No

Attention: Sarah Client

E-mail Address: sarah.client@nowhere.techflow.com

Phone: (619) 555-0105   Ext:

Address, Line 1: 123 Main St.

Address, Line 2:

City: Springfield

State/Province: CA
Click here for state abbreviation descriptions

Zip/Postal Code: 95370

Country: United States

The Shipping Address or primary Place of Performance defaults to the client info on the client's user profile

10

GSA Order Specifics

☞ All Fields marked with 🟡 should be filled in by a GSA Representative.

Region: 🟡 `40. National IT Commodity Region ▾`

Program: National IT Commodity Program

Preparing Contracting Office Code: SJ000 GSA/FSS National IT Commodity Program - NITCP (R40)

Territory: 🟡 `Atlanta-GA ▾`

You may associate the order to an existing Order ID, or an Order ID will be generated and displayed to you upon Submit or Save of this form.

Order ID: [To Be Generated]

`Associate with Existing Order ID`

Originating Order ID: [ ]

Originating ACT Number: [ ]

IA Number(s): [ ]

IA Attachment(s): **File Attachments:**

Attach Files

> Select the Region and Territory.
> Program **National IT Commodity Program** and PCOC will be automatically populated for Region 40.

> Order ID will be automatically generated. Optionally, you can associate an order to an existing Order ID. See the *Standardized Numbering Conventions* training module for additional information.

> If the order was transferred from a region, enter the original order's Order ID and ACT number. Used for reporting purposes.

GSA Order Support

☞ All Fields marked with 🟡 should be filled in by a GSA Representative.

1. Cust Svc Rep: 🟡 `Christopher CSR ▾`

2. Cust Svc Rep: `<< Select Customer Service Rep >> ▾`

3. Cust Svc Rep: `<< Select Customer Service Rep >> ▾`

Fund Manager: 🟡 `<< Select Fund Manager >> ▾`

Contracting Officer: `<< Select Contracting Officer >> ▾`

Alt Contract Officer: `<< Select Contracting Officer >> ▾`

▶ Edit History

`Save As Draft` `Submit and Proceed To BOMSOW` `Close Without Saving`

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11

▼GSA Order Specifics

☞ All Fields marked with ⬤ should be filled in by a GSA Representative.

Region: ⬤ [40. National IT Commodity Region ▼]

Program: National IT Commodity Program

Preparing Contracting Office Code: SJ000 GSA/FSS National IT Commodity Program - NITCP (R40)

Territory: ⬤ [Atlanta-GA ▼]

You may associate the order to an existing Order ID, or an Order ID will be generated and displayed to you upon Submit or Save of this form.

Order ID: [To Be Generated]

[Associate with Existing Order ID]

Originating Order ID: [_____]

Originating ACT Number: [_____]

IA Number(s): [_____]

← Enter the Interagency Agreement (IA) Number and/or attach a copy of the signed IA.

IA Attachment(s): **File Attachments:**

[Attach Files]

▼GSA Order Support

☞ All Fields marked with ⬤ should be filled in by a GSA Representative.

1. Cust Svc Rep: ⬤ [Christopher CSR ▼]
2. Cust Svc Rep: [<< Select Customer Service Rep >> ▼]
3. Cust Svc Rep: [<< Select Customer Service Rep >> ▼]
Fund Manager: ⬤ [<< Select Fund Manager >> ▼]
Contracting Officer: [<< Select Contracting Officer >> ▼]
Alt Contract Officer: [<< Select Contracting Officer >> ▼]

Select the users assigned to the order. Selection of the CO is required upon creation of the CERT. If a user is selected for multiple roles, a soft validation will warn that a separation of duties conflict has been identified:

Windows Internet Explorer

❓ The following Separation of Duties conflict(s) have been identified:
George GSA is assigned as Contracting Officer (COI) and Fund Manager (COI)
George GSA is assigned as Primary Customer Service Representative and Fund Manager (COI)

Are you sure you want to submit this Client Order Information document?

[OK]   [Cancel]

▶ Edit History

[Save As Draft]   [Submit and Proceed To BOMSOW]   [Close Without Saving]

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12

GSA Order Specifics

All Fields marked with 🟡 should be filled in by a GSA Representative.

Region: 🟡 40. National IT Commodity Region ▼

Program: National IT Commodity Program

Preparing Contracting Office Code: SJ000 GSA/FSS National IT Commodity Program - NITCP (R40)

Territory: 🟡 Atlanta-GA ▼

You may associate the order to an existing Order ID, or an Order ID will be generated and displayed to you upon Submit or Save of this form.

Order ID: [To Be Generated]

[Associate with Existing Order ID]

Originating Order ID: [ ]

Originating ACT Number: [ ]

IA Number(s): [ ]

IA Attachment(s): **File Attachments:**

Attach Files

GSA Order Support

All Fields marked with 🟡 should be filled in by a GSA Representative.

1. Cust Svc Rep: 🟡 Christopher CSR ▼
2. Cust Svc Rep: << Select Customer Service Rep >> ▼
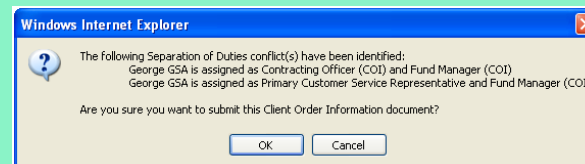3. Cust Svc Rep: << Select Customer Service Rep >> ▼
Fund Manager: 🟡 << Select Fund Manager >> ▼
Contracting Officer: << Select Contracting Officer >> ▼
Alt Contract Officer: << Select Contracting Officer >> ▼

▶ Edit History

[Save As Draft] [Submit and Proceed To BOMSOW] [Close Without Saving]

GSA users do not select a fiscal order type on the COI. The fiscal order type is derived based on the fiscal task types of the task items awarded on the basic order.

If the order contains at least one task item with fiscal task type LAB, COST, or FFP then the user can add any type of task item (LAB, FFP, COM, COST, or FEE) during an Order Mod.

If the order does not contain a LAB, COST, or FFP task item then the user will only have the ability to add COM or FEE task items during an Order Mod.

13

Next Steps…

Click *Save as Draft* to return to the COI later in Draft status. COIs can only be saved as a Draft if the status is still Draft. If a Draft COI is not modified in 30 days it will be automatically cancelled.

Submit the COI to create a BOMSOW
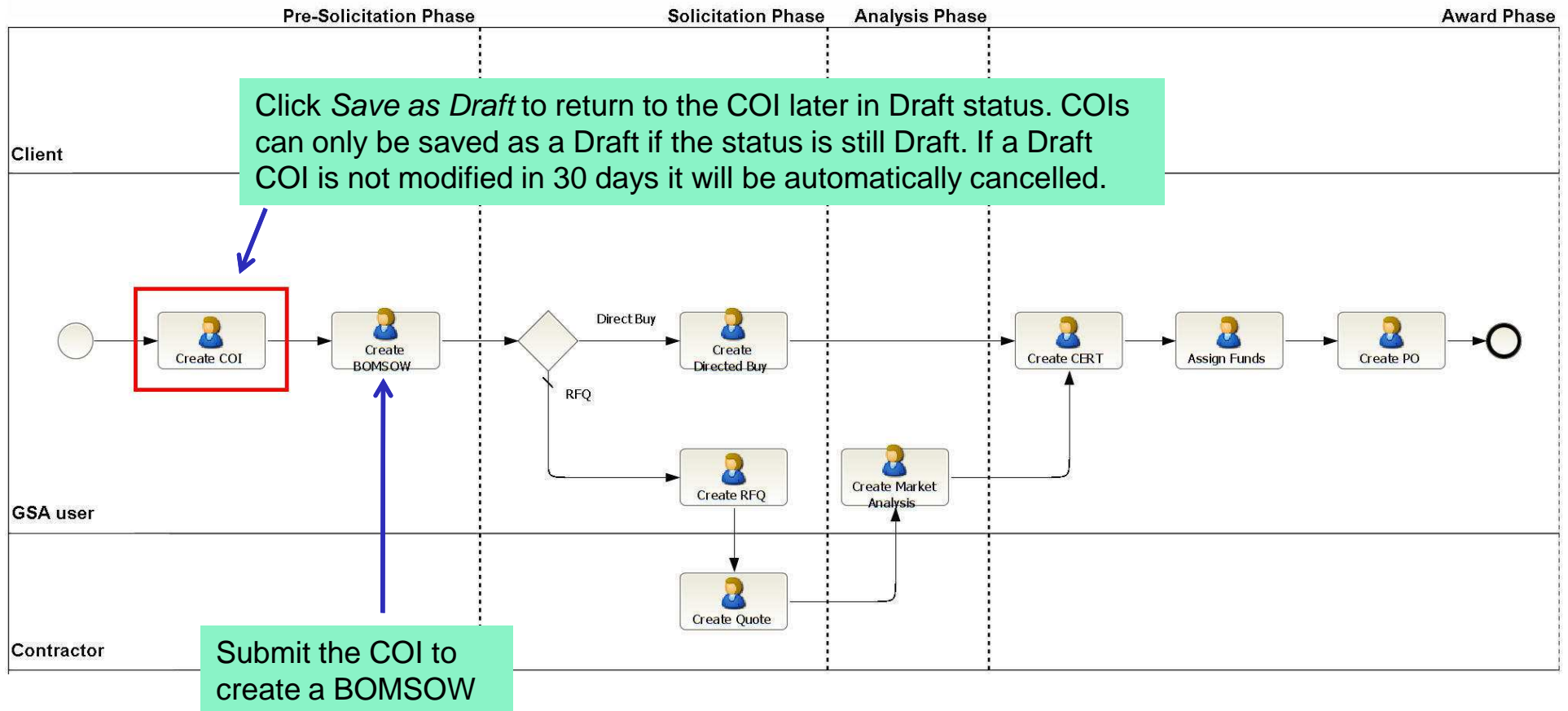
COI Status Glossary

Status	Definition
Draft	COI has been initially submitted, remains in draft status until BOMSOW is created.
GSA Evaluating	BOMSOW has been submitted for GSA Review by GSA and there is not an open RFQ.
Directed Buy	Directed Buy has been created.
RFQ	RFQ has been issued but winning quote has not yet been selected.
Quote Selected	Quote has been selected on Market Analysis.
Pending Client Acceptance	Market Analysis is pending approval from Client.
Pending Approving Official Acceptance	Market Analysis is pending approval from GSA Approving Official.
Quote Accepted	Client has accepted selected Quote on Market Analysis
Approving Official Accepted	GSA Approving Official has accepted Market Analysis
Awarded – Mod [XX]	Mod number [XX] has been signed by Contracting Officer.
Cancelled	Order has been marked inactive by CSR prior to any signed Purchase Orders.
Complete	Order has been marked inactive by CSR after at least one signed Purchase Order.

Federal Acquisition Service

Questions & Support

➢ For questions regarding AAS Policy please contact randy.matlack@gsa.gov or robert.niewood@gsa.gov

➢ For questions regarding the RBA COI training module please contact RBA Technical Support:

Phone: 877-472-4877

Email: AASBS.helpdesk@gsa.gov